

CONTINUOUS IMPROVEMENT ACTION PLANNER

*A Practical Framework to Track, Prioritize,
and Execute Improvements That
Maximize the Value of Your Assets*

PROPERTY NAME: _____ DATE: _____ COMPLETED BY: _____



PURPOSE

This planner helps you establish a culture of continuous improvement by identifying opportunities, setting priorities, tracking progress, and measuring results over time.

Building Use / Type: _____

Year Built: _____

Total Building SF: _____

Number of Stories: _____

Last Major Renovation: _____

Overall Condition Rating (1-5): _____

1 2 3 4 5
Poor Excellent

CONTINUOUS IMPROVEMENT PRINCIPLES



FOCUS ON VALUE

Improve what matters most.



DECISIONS BASED ON DATA

Use facts, not assumptions.



PLAN AHEAD

Prioritize and prepare.



EXECUTE CONSISTENTLY

Take action and stay on track.



MEASURE & LEARN

Review results and adapt.



SHARE & COLLABORATE

Communicate and build on success.



1 ASSESS & IDENTIFY OPPORTUNITIES

Evaluate each area of your building and operations to identify improvement opportunities. Rate the potential impact and feasibility of each opportunity.

AREA / SYSTEM	EXAMPLES	IMPACT (1-5)	FEASIBILITY (1-5)	COMMENTS / NOTES
Building Envelope	Sealing, roofing, windows, insulation, water intrusion	1 2 3 4 5	1 2 3 4 5	
Roofing	Repairs, coatings, maintenance, drainage	1 2 3 4 5	1 2 3 4 5	
HVAC	Efficiency upgrades, controls, maintenance	1 2 3 4 5	1 2 3 4 5	
Electrical	Lighting, panels, controls, power quality	1 2 3 4 5	1 2 3 4 5	
Plumbing	Fixtures, leaks, water efficiency	1 2 3 4 5	1 2 3 4 5	
Life Safety	Systems testing, code compliance	1 2 3 4 5	1 2 3 4 5	
Interior Finishes	Flooring, paint, ceilings, fixtures	1 2 3 4 5	1 2 3 4 5	
Site & Drainage	Pavement, landscaping, stormwater management	1 2 3 4 5	1 2 3 4 5	
Operations	Workflows, tenant service, vendor mgmt.	1 2 3 4 5	1 2 3 4 5	
Sustainability	Energy, water, waste, ESG initiatives	1 2 3 4 5	1 2 3 4 5	

Impact: 1 = Low Impact 5 = High Impact Feasibility: 1 = Difficult 5 = Easy

Score opportunities by Impact x Feasibility to help identify high-priority items.



2 PRIORITIZE IMPROVEMENTS

Rank opportunities based on Impact, Feasibility, Risk, and Alignment with Goals.

RANK	OPPORTUNITY	IMPACT (1-5)	FEASIBILITY (1-5)	RISK IF DELAYED (1-5)	ALIGNMENT WITH GOALS (1-5)	TOTAL SCORE	PRIORITY (H/M/L)
1.							
2.							
3.							
4.							
5.							

Scoring Guide: 1 = Low 3 = Moderate 5 = High Total Score: 20-25 = High Priority | 10-19 = Medium | 5-9 = Low



ACTION PLAN

Document actions needed to implement your improvement priorities.

PRIORITY (H/M/L)	ACTION / PROJECT DESCRIPTION	OBJECTIVE / EXPECTED BENEFIT	RESPONSIBLE PARTY	TARGET START DATE	TARGET COMPLETION DATE	ESTIMATED COST	STATUS
							☐ Not Started ☐ In Progress ☐ Completed ☐ On Hold
							☐ Not Started ☐ In Progress ☐ Completed ☐ On Hold
							☐ Not Started ☐ In Progress ☐ Completed ☐ On Hold
							☐ Not Started ☐ In Progress ☐ Completed ☐ On Hold



TRACK & MEASURE RESULTS

Monitor key metrics to measure performance and validate results.

METRIC	CURRENT VALUE	TARGET VALUE	FREQUENCY	RESPONSIBLE PARTY	NOTES
Energy Use (kWh)					
Water Use (Gallons)					
Operating Costs (\$)					
Work Orders Completed					
Tenant Satisfaction (1-5)					
System Downtime (Hours)					
Other: _____					



REVIEW & LEARN

Capture lessons learned and refine your approach.

What worked well? _____

What challenges did we encounter? _____

What can we do better next time? _____

Key takeaways / lessons learned: _____



ASSESSMENT RECORD

Track assessments to monitor progress over time.

ASSESSMENT DATE	COMPLETED BY	OVERALL CONDITION RATING (1-5)	NOTES / FOLLOW-UP ACTIONS



COMMUNICATE & SHARE

Share successes and insights to build a culture of continuous improvement.

Who should receive updates?

☐ Ownership / Investors

☐ Property Management Team

☐ Tenants

☐ Vendors / Partners

☐ Other: _____

How will we communicate?

☐ Quarterly Reports

☐ Dashboard / Scorecard

☐ Meetings / Reviews

☐ Other: _____



NEXT STEPS

- ☐ Review and update this plan quarterly
- ☐ Reassess priorities and adjust as needed
- ☐ Update capital plan and budgets
- ☐ Celebrate wins and share results
- ☐ Commit to continuous progress

Next Review Date: _____

Notes: _____

Prepared By: _____

Company: _____

Date: _____

Signature: _____



*Small improvements today.
Stronger assets tomorrow.
Greater value for years to come.*



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*Continuous improvement is the key
to long-term performance, sustainability,
and asset value.*

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